Tourism Forum

Building on our strengths. Planning for tomorrow.

Report of the Forum
February, 2001

Prepared by:
Western Management Consultants

Manitoba
Culture, Heritage
and Tourism

102-03058/
1

ACKNOWLEDGEMENTS

Many dedicated people collaborated to make the Manitoba Tourism Forum 2001 a signal event and a rewarding success.

Thanks go to Max Johnson who was instrumental in developing the initiative and provided key leadership from industry in its design, process and outcomes.

The importance of the session was underlined not just because Premier Gary Doer opened the meeting and Honorable Ron Lemieux, Minister of Culture, Heritage and Tourism closed the sessions, but also because Deputy Minister Tom Carson acted as Master of Ceremonies for the entire session. It is gratifying to see that the high importance placed by industry on this Forum was shared by the Manitoba Government.

Seventeen Manitoba industry leaders agreed to Chair and facilitate their industry colleagues in this process. They worked by e-mail in advance, spent significant time in training for their roles, and provided skillful support to the industry leaders at their respective tables. The table chairs/facilitators were:

- Max Johnson, ACTA Manitoba
- Jimm Simon, Association of Manitoba Museums
- Beverley Hill, Brandon Tourism and Convention Services
- John Thunder, Buffalo Point International Resort
- Judy Murphy, Folk Arts Council of Winnipeg Inc. – Folklorama
- Bill Elliott, Fort Whyte Centre
- Brad Stoneman, Goldsand Lake Wilderness Adventures
- Greg Belland, Greg Belland and Associates
- Claudette Leclerc, Manitoba Museum
- David Chizda, Manitoba Tourism Education Council
- Mike Moore, Nature Conservancy of Canada (Manitoba)
- David Shefford, Northern Tourism Committee
- Curtis Jonnie, Spirit Island Development
- Colleen Rogers, Winnipeg Airports Authority Inc.
- Doug Stephen, WOW Hospitality
- Tom Carson, Manitoba Culture, Heritage and Tourism
- Hubert Mesman, Manitoba Culture, Heritage and Tourism

We thank these leaders for their commitment to this process and their industry.

A presentation on the Orkney Experience, a Case Study in Marketing a Small Destination, was made by Cameron Taylor. His willingness to include his time and share the Scottish experience with the Manitoba tourism industry is appreciated.

Staff support was provided through Manitoba Culture, Heritage and Tourism by some 20 staff resources. We thank them for their effort. Staff coordination and much of the preparatory work was orchestrated by Brigitte Sandron, Director of Tourism Planning. Brigitte and her staff did a superb job of organizing and orchestrating the session and we owe a great debt of thanks to her. In particular, Lilian Tankard provided her "normal" high energy and expert organization, for which we thank her very much.

Hubert Mesman, Assistant Deputy Minister, Manitoba Culture, Heritage and Tourism provided guidance, planning and leadership for the session. We appreciate his leadership role in making possible the Manitoba Tourism Forum 2001.

Finally, allow us to thank the Manitoba tourism industry and to say what an honour it has been for Western Management Consultants to work with you at this important stage of tourism development in your province.

J. Kent Stewart, MCIP, CMC, Director
Western Management Consultants
March, 2001

Manitoba's key tourism industry stakeholders came together on February 6, 2001 at the invitation of Premier Gary Doer. They established strategic priorities for the industry in product development and marketing for the coming years.

EXECUTIVE SUMMARY

Strategic Priorities:

#1. Improve and Expand Manitoba's Nature-Based Tourism Product and Opportunities

#2. Improve and Expand Manitoba's Cultural and Heritage-Based Tourism Product

#3. Pursue Additional Product Opportunities for Manitoba as they Become Evident

Product Development Opportunities

Product development strategies were suggested for each of 18 specific product opportunities identified for the three major priorities.

The roles of government – leader, facilitator, quality monitor, infrastructure provider were set out. Roles of the private sector – product innovation and quality, packaging, staff motivation, and income generation were also highlighted.

A long list of suggestions for training the tourism industry and maintaining quality was developed by the industry.

Responding to the need to build capacity in communities, industry suggested efforts be focused on:

- Community Development – awareness, organization, strategy, and financial support
- Long-term Commitment to Community Capacity Development
- Capital and Funding Assistance
- A Strong Tourism Association
- A Manitoba Tourism Strategy
- Aggressive Marketing

One marketing priority was suggested:

Increase Tourism Spending from Out-of-Province Markets.

Marketing Opportunities

Five marketing opportunities were suggested to achieve the strategic priority.

- Manitoba will have an aggressive and proactive web marketing presence.
- Manitoba will establish strong brand awareness among targeted audiences.
- The upper Midwest United States will be a key target market.
- Packaging market-ready Manitoba products will increase.
- Partnership marketing between government and industry will increase.

For each opportunity a series of strategies were provided by the industry. Industry also advised on how to "pool" marketing resources effectively and how to make Manitobans "Ambassadors" for tourism.

Next Steps

A number of "next steps" were suggested by the facilitator, based on Forum results:

- Initiate meeting of key industry leaders to evolve a mechanism for ongoing communication and coordination.
- "Branding" Manitoba – initiate a renewed branding approach.
- Focus on immediate "Wins", such as community-based facilitation, developing a strong web presence, and neighbouring U.S. marketing.
- Prepare a Tourism Development Strategy for Manitoba.

Manitoba has many areas of strengths in tourism sectors, sub-sectors, programs, and support systems where it is doing very well. The focus of the future will be on moving from these strengths to even greater strength and breadth in tourism. The 2001 Manitoba Tourism Forum, thanks to the enthusiastic involvement of the industry, set the stage for this movement forward.

INTRODUCTION

The 2001 Manitoba Tourism Forum, held at the Manitoba Museum on February 6, 2001, saw some 150 tourism industry leaders come together to evolve tourism priorities for Manitoba.

Invited to attend by Premier Gary Doer, Manitoba's tourism leaders hailed from all areas of tourism, all regions of Manitoba, and all sizes of tourism organizations. They were challenged by the Premier to use the day to consider the key directions in tourism that would benefit all Manitobans.

Tourism leaders were asked to consider strategic priorities for Manitoba in two areas:

- tourism product development; and
- tourism marketing.

The day was structured around these two important theme areas. This report summarizes the outcomes of this important Forum.

The Process

The session was chaired by Tom Carson, Deputy Minister of Culture, Heritage and Tourism. It was facilitated by Kent Stewart, CMC, Director of Western Management Consultants.

The session opened with comments by some of the key stakeholders in the process. **Premier Gary Doer** opened the Forum and emphasized the value and importance of the tourism sector in Manitoba's economy and the importance of this Forum in providing input to policy and strategy development.

Max Johnson, ACTA Manitoba, addressed the need for industry to provide leadership in tourism strategy development and the importance of partnerships between government and industry in planning and executing tourism strategy.

Hubert Mesman, Assistant Deputy Minister, Tourism Division, presented results of the market research conducted by Manitoba in the Spring of 2000, and highlighted opportunities that were apparent from this research.

Cameron Taylor, Seabridge Consultants, outlined key principles for tourism development by using the Orkney experience as an example, a "case study" which emphasized the importance of many of the factors other speakers had identified.

In the following sessions, the Forum was structured in "17 tables" of industry leaders. Industry leaders were assigned to tables so that the breadth of the industry was fairly represented at each. Each table Chair was also supported by one staff member from Manitoba Culture, Heritage and Tourism.

At each table, and for each theme, individuals were first asked to record their thoughts in response to a number of questions. They then discussed the most important questions as a table, prioritized their responses, and presented them to the full group. The responses of the full group were "rolled-up" by the facilitators/staff and presented back as "initial priorities" of the Forum.

It should be noted that this report communicates the recommendations of the Manitoba industry relative to areas of new or renewed focus for Manitoba. As such it focuses on the change areas rather than the many areas in which the tourism industry is very satisfied with the present programs and services. For example, the community tourism planning, rural tourism support, regional support, tourism training, and input into tourism marketing were all mentioned by participants as areas in which services were good at present. Opportunities to enhance these services even more was the focus of the group's energy.

This report refines some of the work done in this one-day process by reviewing input from all questions, assessing priorities on a weighted basis and for all individual participants, and grouping the results as appropriate.

STRATEGIES: PRODUCT DEVELOPMENT PRIORITIES FOR MANITOBA

Participants were asked the following question: "What are the top three opportunities for development or expansion of our Tourism Products in Manitoba?"

The following three strategic priorities for product development are based on this input. Strategy, as defined for this Forum, consists of **"doing the right things, well, at the right time."** It means finding the very few, most important *Strategic Priorities* and putting maximum effort into making them happen.

The strategic priorities in product development identified by Manitoba's tourism leaders consist of the following:

Improve and Expand Manitoba's Cultural and Heritage-based Tourism Product

Pursue Additional Product Opportunities for Manitoba as they Become Evident

Improve and Expand Manitoba's Nature-based Tourism Product and Opportunities

Range of Results from the Session

During the session, product development priorities were ranked based on all 17 tables' ranking of the opportunity as first, second, or third. Both Nature-based and Culture/Heritage Tourism were rated at the highest level on this basis.

Results of Table Discussions

The results from each table were subsequently "weighted" on the basis of their rankings (1st, 2nd, 3rd) by each table. Some segments were grouped together based on their relationships with each other. On this basis, the following product priorities were identified:

1. Nature-Based, Eco-Tourism, and Adventure Tourism;
2. Cultural and Heritage Tourism;
3. Four Season Development;
3. Scenic Road Development;
4. Winter Tourism;
5. Aboriginal Tourism; and
5. Urban Tourism/Winnipeg Development.

RESULTS OF INDIVIDUAL PARTICIPANT RESPONSES

Following the session, the priorities of each individual participant were weighted and results were aggregated across the whole group of some 118 participants. The top product development opportunities are based on the weighted scores of all respondents. The table following summarizes the results of this work.

FULL GROUP RANKING TOP 10 PRODUCT OPPORTUNITIES

Rank		Score	Incidence	Percent
1	Eco-Tourism	148	64	21%
2	Culture/Heritage	80	39	12.8%
3	Aboriginal	55	23	7.6%
4	Festivals and Events	48	26	8.6%
5	Outdoor	35	16	5.3%
6	Winter	30	14	4.6%
7	Adventure	28	14	4.6%
8	Agri-Tourism	27	15	4.9%
9	Four Season Tourism	24	10	3.3%
10	Key Attractions	22	13	4.3%
	Campgrounds, Parks and Resorts	22	9	3%
11	Marketing and Conventions	17	9	3%
12	Historical Tourism	15	9	3%
	Marketing	15	6	2%
13	Urban Adventure	10	4	1.3%
14	Urban/Rural Packages	9	5	1.6%
	Gaming	9	5	1.6%
	Family-Oriented	9	5	1.6%
15	Recreation	7	4	1.3%
16	Internet Development	5	2	0.6%
17	Unique Opportunities	3	1	0.3%
	Bus Tours/Guided Tours	3	2	0.6%
18	Film Industry	2	2	0.6%
	Extreme Tourism	2	1	0.3%
	Sport Tourism	2	2	0.6%
	Value for Dollar	2	1	0.6%
19	Educational Tourism	1	1	0.3%
	Soft Tourism	1	1	0.3%
	Global Markets	1	1	0.3%
	Craft-Based Holidays	1	1	0.3%

The priorities as identified by individuals clearly overlap one another, and some grouping of results was needed. "Nature-Based Tourism" includes the following "top ranked" opportunities identified as:

- #1 – Eco-Tourism;
- #5 – Outdoor Tourism; and
- #7 – Adventure Tourism.

Together these categories account for 31% of all comments by participants. If one interprets other priorities in the top ten (#6 – Winter, #9 – Four Season, #10 – Campgrounds, Parks and Resorts) to be primarily focused on Nature-Based pursuits the incidence of mentions increases to 42% of all "mentions" by participants.

Cultural/Heritage Tourism as a priority can also be seen to encompass other priorities. "Cultural/Heritage" tourism could include:

- #2 – Culture/Heritage;
- #3 – Aboriginal;
- #4 – Festivals/Events; and
- #8 – Agri-Tourism.

If interpreted in this manner, Culture/Heritage tourism as a priority accounts for 34% of all the "mentions" by participants. One could also interpret a large number of the product opportunities that did not become "top 10" items as being part of one or the other of these two strategic priorities.

The product opportunities identified by this method were then regrouped under these major headings. This grouping is summarized in the pages following as "Product Opportunities" that fall within the strategic priority.

STRATEGIC PRODUCT PRIORITY #1:

Improve and Expand Manitoba's Nature-Based Tourism Product and Opportunities

Key Product Development Opportunities

- Manitoba should assess and pursue Eco-Tourism in development opportunities wherever appropriate.
- Outdoor Tourism Products – Adventure Tourism, Soft-Adventure Tourism, Outdoor Recreation, Extreme Adventure Tourism should be improved, developed and expanded where appropriate.
- The traditional outdoor sector in Manitoba consisting of a strong and profitable hunting and fishing experience in Manitoba lodges and camps, remains a strong contributor to the tourism sector and should be maintained.
- Winter Tourism development of nature-based and outdoor products should be fostered.
- Four-season Tourism based on a foundation of nature-based and outdoor adventure activities should be fostered.
- Aboriginal-owned tourism enterprises focused on nature-based and outdoor adventure tourism should be fostered, whether or not they include Aboriginal heritage interpretation.
- Festivals and events that foster and support the nature-based and outdoor adventure product groupings should be developed on a four-season basis.

STRATEGIC PRODUCT PRIORITY #2:

Improve and Expand Manitoba's Cultural and Heritage-Based Tourism Product

Key Development Opportunities

- Heritage and Cultural Tourism products are expanded, developed and linked.
- Aboriginal Cultural and Heritage Tourism experiences reflect the tourism aspirations of the people and offer a unique experience to guests.
- Cultural and Heritage festivals and events increase product appeal, foster four season tourism, and draw people to the regions of Manitoba.
- Key Cultural and Heritage Tourism attractions are upgraded, expanded and created in support of unique culture and heritage themes. Agri-Tourism opportunities are expanded to illustrate the unique culture, heritage, and agricultural practices of Manitobans.
- Historical Tourism is supported through enhanced product development and interpretation.

STRATEGIC PRODUCT PRIORITY #3:

Pursue Additional Product Opportunities for Manitoba as they Become Evident

Suggested Product Opportunities from Individuals

- Urban adventure experiences are developed to enhance the appeal of urban places.
- Gaming sector is enhanced and developed.
- Family-oriented product is developed and enhanced.
- Annual "unique" products are developed.
- Film industry development is supported.
- Sport Tourism is expanded.
- Educational Tourism (English as a Second Language, etc.) is expanded.
- Product development in support of "craft-based" holidays is enhanced and developed.

While the priorities and opportunities identified above are those representing the consensus of the groups involved, it is important to reflect the views of the group about the comments not illustrated in the report. Among these comments are a number of "real gems," great ideas that could be real winners for operators or regions if developed. These ideas have all been "trapped" in the process and will be reviewed and assessed in coming months.

Product Development Strategies

Participants thought about product development strategies to support their own top priorities. These individual strategies were captured in the process and will be used later in the development of strategy.

Results of Table Discussions

The 17 tables developed strategies for the top priority identified at the table level. These strategies were then "rolled-up" by the facilitators and presented back to the group as an indicator of the key things Manitoba needs to do in order to move forward as a tourism destination. They are:

- Develop an inventory of tourism products in Manitoba as a basis for both product development and marketing.
- Enhance education and training to provide a Manitoba labour force in support of tourism development.
- Ensure quality is maintained by developing standards, grading systems and quality recognition programs for and with the industry.
- Improve and enhance Manitoba's basic infrastructure in support of tourism product development.
- Enhance coordination and communication among Manitoba's tourism industry, including the private, not-for-profit, and government sectors.
- Maintain ongoing, strategic research to validate the product development strategy.
- Ensure government-supported incentive programs are available to stimulate product investment in tourism.

While these strategies are generic, they could be applied with some validity to each of the strategic priorities and their associated opportunities.

Results of Individual Participant Responses

By scanning the strategies across the 118 participants who suggested strategies, a sense for the approach needed for each major product opportunity is determined.

STRATEGIC PRIORITY #1: Improve and Expand Manitoba's Nature-based Tourism Product and Opportunities

PRODUCT OPPORTUNITIES	STRATEGIES
Manitoba should pursue eco-tourism development opportunities wherever possible.	◗ Develop clear "operating definition" for eco-tourism. ◗ Categorize/rate existing eco-tourism product. Maintain an inventory of "best practices" in province and elsewhere. ◗ Conduct ongoing market research to establish the specific areas of distinct advantage that Manitoba offers in this area. ◗ Identify regions, areas, destinations that are preferred for such development. ◗ Develop a policy framework that will protect the eco-tourism resource and the market in the long-term. ◗ Develop support systems to foster eco-tourism in development opportunities – training, financial incentives, marketing support, strategies for sustainable development, accreditation. ◗ Improve accessibility to eco-tourism products in Manitoba. ◗ Promote the distinctive advantage of Manitoba eco-tourism.
Outdoor adventure tourism products – adventure tourism, soft adventure tourism, outdoor recreation, extreme adventure tourism should be developed and expanded where appropriate.	◗ Identify/confirm the major geographic assets of Manitoba for adventure tourism – have accessible inventory of trails, rivers, regions, natural attractions, operators relevant to all seasons. ◗ Research/establish key market potential, target markets, relevant positioning of this product in Canadian context. ◗ Review/ensure access to product is competitive with other regions. ◗ Research and provide incentives for development of unique or new outdoor adventure – Aurora viewing, extreme experience, Hudson Bay Region, Aboriginal heritage (adventure). ◗ Complete Trans-Canada Trail Project. ◗ Provide training at all levels – business start-up, "going concern" operators, staff training, entrepreneurship, customer service, business finance, succession planning etc. ◗ Provide information on best practices, collaboration and partnerships, packaging initiatives and other keys to success. ◗ Support coordinated effective marketing.

STRATEGIC PRIORITY #1: Improve and Expand Manitoba's Nature-based Tourism Product and Opportunities

PRODUCT OPPORTUNITIES	STRATEGIES
Winter tourism: development of nature-based and outdoor products should be fostered.	◗ Market and competitive research to establish key areas of potential. ◗ Understand existing situation in key winter products – snowmobiling, cross-country skiing, dogsledding, winter resorts, winter festivals, etc. ◗ Prepare strategies – key resorts, festivals, etc. enhance existing resorts to four-season status. ◗ Ensure infrastructure to support development is in place – access, safety, grooming, etc., especially for snowmobile product. ◗ Develop events/festivals in support of winter products. ◗ Support aggressive, creative marketing.
Four-season tourism based on a foundation of nature-based and outdoor adventure activities should be fostered.	◗ Through research, identify areas of highest potential for four-season development. Prioritize areas. ◗ Identify competitive strengths/opportunities and barriers for priority development areas. ◗ Develop a strategy for area development and to address barriers. ◗ Encourage outdoor operators/associations to collaborate in four-season destination areas. ◗ Market four-season areas as "new." ◗ Consider urban areas as opportunity areas for four season development.
Aboriginal-owned tourism enterprises focused on nature-based and outdoor adventure tourism should be fostered whether or not they include Aboriginal heritage interpretation.	◗ Work closely and in direct cooperation with Aboriginal communities throughout the province. ◗ Where needed, provide training support for Aboriginal entrepreneurs. ◗ Review investment requirements and supply, working in close collaboration with Aboriginal people and federal resources. ◗ Research full/detailed market potential. ◗ Create quality control/grading criteria. ◗ Provide marketing support/leadership and foster partnerships.

STRATEGIC PRIORITY #1: Improve and Expand Manitoba's Nature-based Tourism Product and Opportunities

PRODUCT OPPORTUNITIES	STRATEGIES
Festivals and events that foster and support the nature-based and outdoor adventure product groupings should be developed on a four season basis. **(also relevant to Strategic Priority #2)**	◗ Establish a bureau/secretariat to research opportunity, maintain inventory, assess gaps, and market potential. ◗ Develop new events re: Manitoba strengths – Powwows, The Forks, Northern Winter. ◗ "Brand" Manitoba's cultural diversity as a distinguishing feature.
The traditional outdoor sector in Manitoba, consisting of a strong and profitable hunting and fishing experience in Manitoba lodges and camps remains a strong contributor to the tourism sector.	◗ Maintain an understanding of how important hunting and fishing tourism is to Manitoba - through inventories and ratings of lodges, camps, operators, and activities. ◗ Maintain understanding of impact – dollars, jobs, infrastructure, flights, that can be attributed to this sector. ◗ Ensure resource sustainability and quality through excellent management. ◗ Ensure operator quality through provision of training, accreditation, financing, and rating systems. ◗ Promote this product aggressively in key markets.

STRATEGIC PRIORITY #2: Improve and Expand Manitoba's Culture and Heritage-based Tourism Product

PRODUCT OPPORTUNITIES	STRATEGIES
Heritage and cultural tourism products are expanded, developed, and linked.	◗ Develop quality research on trends, product situation and quality, "experience sought," specific market interests, competitive advantage, and access issues. ◗ Ensure appropriate, quality tourism services are clustered at/near heritage tourism attractions/events. ◗ Research sustainability of heritage and cultural assets – major attractions, parks and heritage sites, events. ◗ Ensure adequate, sustainable funding sources exist to support core product. ◗ Provide/facilitate necessary training for cultural and heritage operators and staff. ◗ Market the product.
Aboriginal cultural and heritage tourism experiences reflect the tourism aspirations of Aboriginal people and offer a unique experience to their guests.	◗ Through research, establish the specific interests of focused market segments. ◗ Identify key opportunity areas for Aboriginal people interested in Aboriginal cultural and heritage product development. ◗ Work closely in cooperation with Aboriginal peoples to ensure product interest. ◗ Provide training and support for Aboriginal entrepreneurs and communities – cultural product, entrepreneurship, investment etc. ◗ Provide marketing support services as needed.
Historical tourism is supported through enhanced product development and interpretation.	◗ Identify/inventory historical tourism assets as part of cultural and heritage tourism strategy work. ◗ Research historical and genealogical tourism markets. ◗ Enhance product and match market needs. ◗ Encourage collaborative marketing.

STRATEGIC PRIORITY #2: Improve and Expand Manitoba's Culture and Heritage-based Tourism Product

PRODUCT OPPORTUNITIES	STRATEGIES
Cultural and heritage festivals and events increase product appeal, foster four-season tourism and draw people to the regions of Manitoba.	◗ Establish a bureau/secretariat to research opportunity, maintain festivals inventory, assess market needs, identify gaps, and coordinate festivals research. ◗ Identify and target hallmark events – cultural and heritage, sports, festivals etc., that would differentiate and promote Manitoba. ◗ Develop a funding/support mechanism to ensure sustainability of cultural and heritage festivals product. ◗ Foster heritage partnerships and collaboration. ◗ Encourage cultural community to provide market-ready tourism products. ◗ At community level, raise interest, awareness, and understanding of value of cultural and heritage tourism products. ◗ Develop province-wide vision, direction, strategy and collaboration mechanisms for cultural and heritage tourism. ◗ Facilitate collaboration marketing of culture and heritage, and "brand" the unique cultural diversity of Manitoba.
Key cultural and heritage tourism attractions are upgraded, expanded, and created in support of unique Manitoba culture and heritage themes. **Agri-Tourism opportunities are expanded to illustrate the unique culture, heritage, and agricultural practices of Manitobans.**	◗ Identify/inventory key attractions and themes. ◗ Research market needs, product/market match. ◗ Identify existing product/asset issues and upgrading/expansion requirements. ◗ Link products and themes in travel corridors where appropriate. ◗ Encourage collaborative marketing of product.

STRATEGIC PRIORITY #3: Pursue Additional Product Opportunities for Manitoba as they Become Evident

PRODUCT OPPORTUNITIES	STRATEGIES
Urban "adventure" experiences are developed to enhance the appeal of urban places.	◗ Research and develop product positioning and strategy for urban adventure tourism. ◗ Encourage collaborative promotion.
Gaming sector is enhanced and developed.	◗ Assess status, markets and opportunities in gaming sector. ◗ Develop and execute strategy.
Family-oriented products are developed and enhanced.	◗ Assess status of family-oriented product, product positioning, strategies and marketing. ◗ Develop and execute strategy for family-oriented tourism.
Film industry development is supported.	◗ Research competitive positioning and potential of Manitoba for film industry ◗ Develop policy, strategy and tools for execution of strategy. ◗ Promote film industry development.

STRATEGIC PRIORITY #3: Pursue Additional Product Opportunities for Manitoba as they Become Evident

PRODUCT OPPORTUNITIES	STRATEGIES
Sport Tourism is expanded.	◗ Research competitive positioning and potential of Manitoba for sport. ◗ Develop policy, strategy, and tools for execution of strategy. ◗ Promote sport development.
Educational tourism (English-as-a-Second-Language) is expanded.	◗ Research and develop strategy for positioning Manitoba in educational tourism. ◗ Promote educational tourism through partnerships and cooperative selling.
Product development in support of craft-based holidays is enhanced and developed.	◗ Research/define craft-based holidays, its markets, Manitoba's position and the opportunity. ◗ Develop strategy. ◗ Execute strategy.

ROLES OF GOVERNMENT AND THE PRIVATE SECTOR

Participants considered the appropriate roles of government and the private sector in tourism product development.

Roles of Government

- Leadership, industry coordination, and facilitator of industry visions and strategy.
- Research, forecasting, market intelligence, competitive intelligence, and evaluation.
- Primary awareness marketer in "branding" Manitoba.
- Primary facilitator of marketing strategy and plan for collaborative execution. A financial partner and leader in executing the plan.
- Liaison role with Canadian Tourism Commission, as leader and coordinator of marketing for Manitoba's industry.
- Provision of a supportive regulatory environment.
- Protection and maintenance of the natural resource assets in Manitoba.
- Provision of quality, sustainable infrastructure and a secure environment.
- Quality assurance in tourism through facilitation of certification, accreditation, grading and rating.
- Education and training support for tourism industry.
- Facilitator of access to capital. Funding program delivery.
- Facilitator of cooperative community and private sector tourism development efforts.

Roles of Private Sector

- Research and develop new tourism products and services to meet market demand.
- Maintain high-quality tourism experiences and services in Manitoba.
- Partner with other tourism organizations to provide high-quality packaged tourism product/experience.
- Encourage and support standards of excellence in the industry.
- Attract, train, motivate and recognize tourism staff as the human aspect of excellence in tourism product.
- Focus on product development, positioning and product sales, in collaboration with other tourism businesses, non-profit organizations and government.
- Generate revenue through tourism operations and through this generate income for staff, suppliers, and government through taxation.

INDUSTRY TRAINING REQUIREMENTS

Participants were asked to advise on what industry training programs are needed to prepare the Manitoba labour force for the tourism opportunities.

While many pages of responses were recorded, a sampling of the most prominent comments follows:

- Youth training for kindergarten to Grade 12 students, focused on tourism/hospitality as a career, pride in Manitoba, the heritage and culture of Manitoba, and entrepreneurship opportunities in tourism/hospitality.
  - Consider hospitality training as a credit program at the Grade 12 level, thus many Manitoba students would receive some training.
- Service training for all tourism industry workers… training in basic service needs, hospitality, specific needs of certain market segments, how to talk to visitors, and a variety of communications-related comments on improving service.
  - Some suggested that a group or groups travel the world to observe "best practices" as well as examples of the typical service offering in our origin country environments.
  - MTEC service training (Manitoba Best) was recommended by many. Others said the MTEC programs were in place, and what was needed was an incentive system to encourage employers and employees to take the programs.
  - Accessible programs, affordable to small business was a consistent theme for service/tourism programming.
  - Cultural awareness of Manitoba's many cultures as well as awareness and understanding of the visitor's culture needs to be a part of the training.
  - Knowledge of Manitoba, its culture, history and range of products needs to be part of service/hospitality training programs.
  - Program improvement at Red River College was suggested.

- Specific training programs were identified for a number of tourism sub-sectors, including:
  - Business startup and planning;
  - Small business management;
  - Small scale, low impact tour management;
  - Cultural/Heritage product/tour operator management;
  - Guide training for outdoor adventure guides and businesses;
  - Guide training for environmental businesses;
  - Historical guide, Naturalist Guide, Ornithologist, Botanist training;
  - Snowmobile guide training/certification;
  - Travel Agency training;
  - Private home hospitality training;
  - Event planning and management;
  - Apprenticeship training in hospitality;
  - Sales and marketing;
  - Market readiness training;
  - Public relations for tourism operators;
  - Understanding visitors;
  - Resort management; and
  - Attractions management.
- Entrepreneurship training for tourism entrepreneurs was identified as a need.
- Tour Packaging, especially for smaller scale tours was an identified need.
- Aboriginal sensitivity sessions focused on increasing awareness of Aboriginal tourism opportunities was also suggested.
- Technology training – training in the technologies relevant to tourism operations, marketing and management, but particularly in the web-based opportunities for collaborative marketing and management of Manitoba's tourism enterprises.
- Standards, rating systems, comparative studies of other jurisdictions, quality controls and other tools were identified to improve and maintain product standards.
- Some offered that secure, year-round, well-paying jobs in tourism/hospitality were the key to increasing professionalism and improving the demand for training throughout the industry.

BUILDING COMMUNITY CAPACITY

Participants were asked their advice on what Manitoba could do to build the capacity of communities to respond to tourism opportunities.

A number of major themes are evident:

- **Community Tourism Development** - A significant focus on facilitation of tourism development at the community level is desired. This would involve a large number of separate interventions:
  - A strong awareness program with case studies and examples of communities that have pulled themselves up by the bootstraps to succeed. Communities would learn that, by determining their distinct advantages and executing strategy around this, they could grow in tourism.
  - Community organization support… so communities can learn how to get organized, identify strengths, develop strategies, prepare action plans, and take action.
  - Strategy development help… facilitating the development of community-based strategy.
  - Financial support for all of the above, plus infrastructure and attractions development to stimulate tourism.
  - Community development was the single most significant theme in response to this question on community capacity development.
- **Long-term Commitment** – the provincial government will need to commit, on a long-term basis, to the development of a high-quality tourism sector in Manitoba.
- **Capital and Other Funding Assistance** – many participants said that some form of long-term commitment of capital and organization funding assistance would be needed to move tourism forward. This implies a long-term, strategic commitment to development of the sector by government.
- **Strong Tourism Association** – Funding and organization support for development of a strong provincial tourism organization was noted as being needed. The organization should be significant with some authority to act on key matters. Regional organization, tourism awareness, regional strategy and support for regional/community partnerships in development and marketing were also thought necessary.
- **Manitoba Tourism Strategy** – Manitoba needs an integrated tourism strategy, dealing with product development, regional and community integration, organization and organizational relationships, and the long-term "Vision" for tourism as a key element of the provincial economy.
- **Marketing at all Levels is Needed** – an integrated marketing strategy and plan that links province-wide, regional and community initiatives, creates awareness, generates pride, and puts Manitoba "on the map" for target audiences. An internal promotion scheme is needed to increase the awareness and pride of all Manitobans in what they have to offer the world.

STRATEGIES: MARKETING OPPORTUNITIES FOR MANITOBA

The first question of participants: "What are the top three opportunities for Manitoba to increase visitation and expenditures from out of province markets?"

Participants in the Forum spent time as a group considering the marketing opportunities that are most significant for Manitoba. They responded to five questions on an individual basis, discussed them as a table, and finally presented them to the full group. The results of all table input were again "rolled-up" and presented to all participants.

Marketing Priorities

Results of Table Discussions

Following the "roll-up" of all results at the session, six marketing opportunities were highest priority:

- Internet Development and Marketing;
- Branding and Awareness Marketing;
- Marketing in the U.S.
- Packaging Market-Ready Products;
- Partnership Marketing; and
- Enhanced Media Relations to Increase Editorial Coverage.

Following the session the same table data was weighted by priority (1st, 2nd, 3rd). The top five marketing opportunities are virtually the same by this method. The following table identifies the scores:

MARKETING OPPORTUNITY SCORES, TOP FIVE

Rank		Score	Incidence	Percent
1	Internet Development and Marketing	28	12	23.5%
2	Branding and Awareness Marketing	14	7	13.7%
3	Marketing in U.S.	13	6	11.8%
4	Packaging Market-Ready Product	7	3	5.9%
5	Partnership Marketing	7	3	5.9%
	Other Mentions			
6	Marketing Themes	6	2	3.9%
7	Marketing to Families	3	1	2.0%
7	Strong Product Positioning	3	1	2.0%
7	Education and Training	3	3	5.9%
8	Marketing to Europe	2	1	2.0%
8	Trade Show Marketing	2	1	2.0%
8	Hallmark Events and Festivals	2	1	2.0%
8	Urban/Rural Collaboration	2	1	2.0%
8	Cultural and Heritage Marketing	2	2	3.9%
8	Niche Markets and Products	2	2	3.9%
9	Ambassador Marketing	1	1	2.0%
9	Four-season Destination	1	1	2.0%

TOP STRATEGIC MARKETING PRIORITY

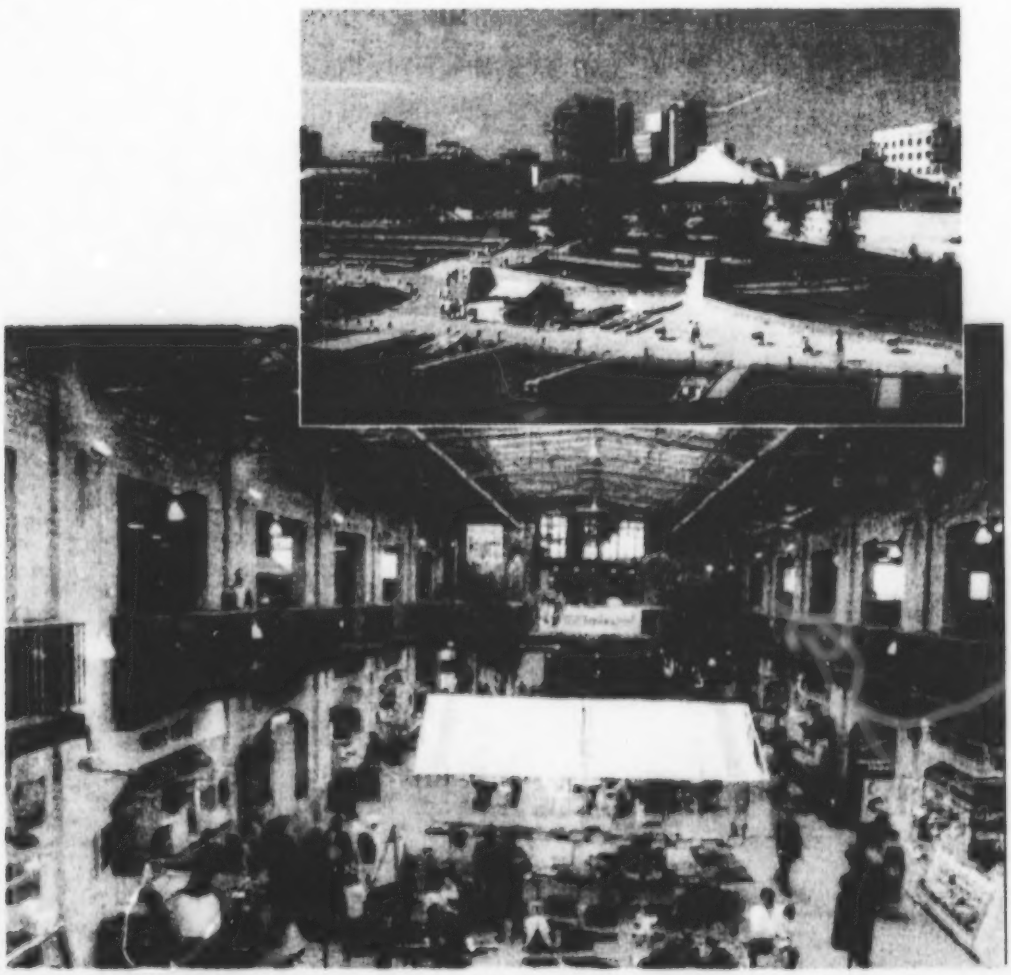
Increase Tourism Spending from Out-of Province Markets

Marketing Opportunities

- Manitoba will have an aggressive and proactive web marketing presence.
- Manitoba will establish strong brand awareness among targeted audiences.
- The upper Midwest United States will be a key target market.
- Packaging market-ready Manitoba products will increase.
- Partnership marketing between government and industry will increase.

Marketing Strategies

The tables suggested marketing strategies for the significant marketing opportunities. The consolidated results of their input follow. While the key strategies represent table consensus, the conference record includes a rich resource of suggestions and ideas for marketing in the strategy responses from individuals in both the product development and the marketing sessions.



TOP STRATEGIC MARKETING PRIORITY: Increase Tourism Spending from Out-of-Province Markets

PRODUCT OPPORTUNITIES	STRATEGIES
Internet development and marketing.	◗ Prepare concept, design and strategy for a comprehensive province-wide web-based approach to tourism. ◗ Facilitate industry to participate by placing their organization on an appropriate "data base" (digital inventory) as a tourism partner. ◗ Research "best practices" in web marketing and develop and apply techniques. ◗ Conduct marketing evaluation on web. ◗ Continually evaluate and evolve web presence as technology changes.
Branding and awareness marketing.	◗ Develop brand and image through a process using an industry/government committee. ◗ Develop comprehensive marketing and communications plan to establish the branding among key target audiences, including Manitobans. ◗ Ensure brand/image is carried on all collateral materials and is evident in all communications. ◗ Continuous evaluation and repositioning of brand/image with changing markets.
Marketing in the U.S.	◗ Complete research in U.S. market on awareness, image, product positioning, saliency, issues, and opportunities for Manitoba. ◗ Work with industry partners inside and outside of Manitoba to prepare winning marketing strategies. ◗ Develop packages for U.S. market as appropriate. ◗ Conduct awareness marketing in key markets. ◗ Conduct collaborative product positioning and sales activity in key markets. ◗ Conduct niche marketing for either "product" niche or market niches where appropriate. ◗ Use media relations, sponsorships, and special promotions to highlight Manitoba in an affordable manner. ◗ Evaluate and adjust approach on a continuous basis.

TOP STRATEGIC MARKETING PRIORITY: Increase Tourism Spending from Out-of-Province Markets

PRODUCT OPPORTUNITIES	STRATEGIES
Packaging market ready products.	◗ Through research identify needs for packaging "success stories" and best practices, training needs, and market readiness. ◗ For priority tourism products relevant to target markets, conduct "state of the product" analysis to determine product readiness. ◗ Develop packaging support tools and training programs for the industry. ◗ Develop market readiness measures, grading/rating systems to support product readiness. ◗ Assess and upgrade infrastructure necessary for packaging – public infrastructure, inbound operations, etc. ◗ Evaluate and adjust packaging approach continually.
Partnership marketing.	◗ Ensure full product inventory and product readiness assessment is completed and available to partners. ◗ Develop marketing plans, programs, and initiatives through consultative processes with tourism partners. ◗ Prepare product positioning, product sales and promotion tactics, and determine total partnerships expenditure in each area, in consultation with partners in industry. ◗ Work with CTC, other provinces, non-traditional partners in developing creative promotion approaches/strategies. ◗ Evaluate all partnership-marketing approaches from a variety of perspectives – partner satisfaction, awareness, product positioning, product sales. ◗ Adjust programs in consultation with industry and communicate results and new opportunities constantly.

POOLING OUR MARKETING RESOURCES

Participants were asked to advise on how best to pool its resources and/or partner to market Manitoba.

A sampling of the most frequent advice:

- Develop a shared vision for Manitoba tourism and its role.
- Establish an industry based "tourism association" or an "association of associations" that would focus energy on communication between key sectors and support development of joint initiatives.
- Share all research, market intelligence, competitive intelligence, and support materials with industry partners.
- Ensure Manitoba product is high-quality rated, accredited, and market-ready before it is promoted in consortia.
- Develop and share "state-of-the-art" information on "product clusters" and facilitate formation of marketing consortia around these clusters.
- Investigate "best practices" in tourism marketing partnerships, visit these regions, and determine relevance to Manitoba.
- Consider allocation of a portion of tourism services fee to invest in marketing.
- Build marketing consortia funds around "product clusters" by creating successful promotion strategies and approaches that rely on partner investment.
- Ensure departments of government that have roles associated with tourism are formally and informally working together on product development, marketing, and evaluation.
- Work through these consortia much more strongly with CTC so that Manitoba marketing investment is better leveraged.
- Ensure that Winnipeg retains a strong tourism marketing capacity and has the financial resources needed as the "hub" of the region.
- Form strategic alliances for marketing purposes with:
  - Tour wholesalers; and
  - Non-traditional partners.
- Communicate with industry to celebrate successes, identify and position consortia, and facilitate marketing investment.

IN-PROVINCE VS. OUT-OF-PROVINCE MARKETING INVESTMENTS

The participants were asked where the emphasis should be placed in terms of Manitoba's marketing investment – how much should be allocated to in-province travel and how much to out-of-province travel.

Responses to this question varied from 10% to 90% "in-province," and table discussions did not succeed in resolving differences.

In the discussion following, it was fairly clear that the participants felt more specific information was needed before such a question could be answered properly.

The decision was to leave this question unanswered.

IDEAS FOR MANITOBA "AMBASSADORS"

The final marketing question asked participants to consider how to foster provincial pride and encourage Manitobans to be ambassadors for tourism.

A sampling of responses:

- Carefully develop a tourism "brand" that resonates for Manitobans as well as outside markets.
- Educate Manitobans from school age onward about the reasons for pride of place.
- Provide training throughout the tourism industry and in other sectors – include a Manitoba awareness component that instills pride.
- Formalize a Manitoba Ambassadors program for outbound Manitobans, snowbirds, and others to support their promotional efforts.
- Reward ambassadors with recognition by their peers.
- Prepare an appropriate range of marketing, promotion, and communication support materials to support the strategies to increase Manitoba pride.
- Position the "100 Reasons" it's great to be a Manitoban and promote it.
- Provide a feedback "scorecard" on how happy visitors have been with their Manitoba experience.

NEXT STEPS

The 2001 Manitoba Tourism Forum was credited by most participants as an effective way to get major opportunities and strategies "on the table."

Participants cautioned organizers and facilitators on at least two things:

- **Recognize Existing Strengths** – even as we support "new" tourism sectors such as eco-tourism, remember that strength in operators and revenue comes from mature sectors such as hunting and fishing.
- **"Don't Bury the Gems"** – the process of "rolling-up" information in a forum of this nature may tend to "bury" some creative gems that come from one or two people. Facilitators should "mine" the results for these gems in addition to reflecting the majority view.

These and the many other points of participants were noted by the organizers.

Based on the discussions of the day, some of the immediate "next steps" for government and industry might include the following:

Leaders Meeting

Industry leaders could convene a group to discuss what form and organization the tourism industry might evolve to realize the goal of ongoing, meaningful communication, and involvement in tourism product development and marketing. Informal or formal organization responses may be envisioned. Thought should be given to the regional and community level involvement in an industry organization, and how the organization might operate with some significant influence.

"Branding Manitoba"

Across most table groups and in the individual comments, a renewed effort to "brand" Manitoba for its tourism strengths was recommended. The focus was on creating a differentiated, memorable and compelling tourism brand that could increase Manitoba pride internally and draw tourism markets from outside Manitoba. A great deal of research and development work has been done on this issue already. The next stage of work on this branding/tourism awareness approach could begin immediately.

Immediate "Wins"

Some of the opportunities represent immediate wins that can be acted on including:

- **Community-Based Facilitation** – It is clear that some form of facilitative help for the community level to develop their capacity to address tourism is desirable. Fortunately tools and "models" are available from other jurisdictions – Community Tourism Action Planning, Community Tourism Marketing Guides, Community-based Surveying Tools, Packaging Support tools, and many others. Pulling these resources together in a way that could help communities might be a quick but very effective and supportive first step. This step should be taken, however, with the consultation and leadership of the community and regional tourism industry.
- **Web Presence** – the process of enhancing the industry web-presence can begin with a "communications site" to connect the industry with each other. Prototypes are readily available and such a site could be operating in short order. Through this medium, further web-evaluation could occur.
- **Neighbouring U.S. Marketing** – the strong agreement around this U.S. target region could be translated within a reasonable time into "prototype" marketing initiatives. Consortia approaches joint investment/leverage models, promotion planning approaches, product positioning, product clusters and non-traditional partnership could be "tested" in this nearby market.

Tourism Strategy for Manitoba

The third element evident in the Forum was the need to begin the process of developing a tourism strategy for Manitoba. From Governance to Vision to Goals, Product Development, Marketing, and Resource Protection discussions, it was clear in the talk of many tables that a tourism strategy for Manitoba would be a desired outcome. Clearly Forum participants would want such a strategy to be prepared with the full participation of the industry. An integrated Strategic Tourism Marketing Plan would follow from this initial strategy work.

CONCLUSION

Each of the major initiatives suggested in this Forum represent a large investment of government resources, funding, and tourism industry volunteer time and energy. Really, the sum of the comments made at the Forum suggest that Manitoba renew its commitment to tourism, develop and launch a new, long-term strategy, revise and renew its marketing effort, and provide the resources to develop the product and market it effectively in key target markets.

It is the view of the facilitator that a series of meetings with key industry people and Government should occur in the next few months. These meetings should confirm the commitment levels Manitoba can and will make to tourism. This would be the starting point for the long-term growth of the industry.

The immediate next steps of Manitoba Culture, Heritage and Tourism following distribution of this summative document will be to incorporate its findings into the planning and operational process of the Department, to make immediate changes where warranted and to carefully consider other change requirements.

The Department should engage the tourism industry in continued consultation and partnership.

For further information contact:

Brigitte Sandron
Director, Tourism Planning
Travel Manitoba

7-155 Carlton Street, Winnipeg, Manitoba R3C 3H8
phone: (204) 945-0761 • toll-free: 1-800-665-0040